

RETIREMENT MATTERS

Retirement Matters October 2025

Thursday 2 October 2025, Royal College of Physicians, 11 St Andrews Pl, London NW1 4LE

Sponsors



Participant List

- **2 Plan Wealth Management Limited**, *Managing Director*
- **3173**, *Chief Technology Officer*
- **7IM Investment and Retirement Solutions Limited**, *Managing Director, Corporate & Strategy Development*
- **Adviser Business Solutions Ltd**, *Director*
- **Anders Bayley Scott Limited**, *Employee Benefits*
- **Apropos Wealth Management Ltd**, *Chartered Financial Planner*
- **Ascot Lloyd**, *Group Investment Director*
- **Atomos**, *Financial Planning Associate*
- **Benchmark Capital**, *Head of Business Operations*
- **Blackstone Moregate Ltd**, *Chief Executive Officer*
- **Bordier & Cie (UK) PLC**, *Head of Wealth Planning*
- **Brooks Wealth Management**, *Independent Financial Planner*
- **Brooks Wealth Management**, *Practice Manager*
- **Brooks Wealth Management**, *Senior Financial Advisor*
- **Broom Consultants Ltd**, *Director*
- **Canaccord Wealth**, *Non Executive Director*
- **Cavendish Medical Ltd**, *Chief Executive Officer*
- **Cavendish Medical Ltd**, *Senior Assistant Financial Planner*
- **Cavendish Ware Limited**, *Associate Director*
- **Cavendish Ware Limited**, *Associate Director*
- **China Construction Bank (London) Limited**, *Financial Crime Executive*
- **Citi Private Bank**, *Head of Wealth Planning*
- **City Asset Management Plc**, *Director, Head of Financial Planning*

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- **Clarity Wealth Management LLP**, *Chartered Financial Planner*
- **Co-op Group**, *Senior Sales & Partnership Manager - Estate Planning*
- **Continuum (Financial Services) LLP**, *Head of Partnership Development*
- **De Carteret Wealth**, *Chief Executive Officer*
- **Defaqto Ltd.**, *Head of Investment & Protection*
- **Defaqto Ltd.**, *Insight & Consulting Director*
- **EBCam Limited**, *Managing Director*
- **Evans Hart Ltd (Incorporating Atwoods Ltd)**, *Paraplanner*
- **Executive Advisory Services Limited**, *Chairman*
- **FPG Fiscal (UK) Limited**, *Director*
- **Fairstone Financial Management Ltd**, *Office Principal/Financial Planner*
- **Fensham Howes Ltd**, *Managing Director, Private Client*
- **Finli (FLP) Ltd**, *Director & Independent Financial Planner*
- **Forvis Mazars Financial Planning Limited**, *Partner, Financial Planning*
- **Foster Denovo**, *Paraplanner Manager*
- **Generation Financial Services Ltd**, *Director*
- **Gerrard Stuart Financial Services Limited**, *Director*
- **HSBC Bank Plc**, *Senior Customer Journey Lead - Build Investments & Financial Planning*
- **Handelsbanken Wealth & Asset Management**, *Wealth Planning Team Leader*
- **Handelsbanken plc**, *Wealth Business Controls Manager*
- **In Partnership Financial Advisers Limited**, *Chartered Financial Planner*
- **Independent Consultant**, *Freelance Financier*
- **Independent**, *Former Head of Financial Planning*
- **Investment Quorum Ltd**, *Wealth Manager*
- **Irwin Mitchell Asset Management A/R Shackleton**, *Head of Growth*
- **Isio Wealth Planning**, *Head of Wealth*
- **Julius Baer International Ltd**, *Director, Wealth Planner*
- **King Financial Planning - AR of Tavistock**, *Managing Partner*
- **King Financial Planning - AR of Tavistock**, *Paraplanner*
- **Legal & General Retail**, *Head of Workplace At Retirement Proposition*
- **Lockhart Capital Management LLP**, *Head of Client Advice*
- **MI Capital Research Limited A/R Defaqto**, *Head of Research*
- **MWA Financial**, *Director*
- **Margetts Wealth Management Ltd**, *Managing Director*
- **MetaWealth**, *Manager*
- **NLP Financial Management Ltd**, *Paraplanner*
- **Nedbank Private Wealth**, *Head of Wealth Planning*

- **Nicholls Stevens (Financial Services) Limited**, *Managing Director*
- **Oakfield Financial Services Limited**, *Managing Director*
- **Oakfield Financial Services Limited**, *Paraplanner*
- **PK Financial Planning LLP A/R Shackleton**, *Director*
- **Pembroke Financial Services Ltd**, *Head of Advice Proposition*
- **Pennymatters Limited**, *Independent Financial Adviser*
- **Pharon Independent Financial Advisers Limited**, *Director*
- **Pharon Independent Financial Advisers Limited**, *Paraplanner*
- **Pivotal Paraplanning**, *Director/Paraplanner*
- **Premier Wealth Solutions Ltd**, *Managing Director*
- **Quilter Cheviot Financial Planning**, *Was Managing Director - Private Clients at 7IM*
- **RBC Brewin Dolphin Limited**, *Planner - Wealth Planning*
- **RSMR**, *MPS Account Manager*
- **Redington (Acquired by Arthur J. Gallagher & Co)**, *Senior Vice President, Defined Contribution Pensions*
- **Sandringham Financial Partners Ltd A/R M&G plc**, *Chartered Advising Partner*
- **Sesame Bankhall Group**, *Chair*
- **Simpson Wood (Financial Services) Limited**, *Compliance & Operations Director*
- **St. James's Place Wealth Management Group**, *Commercial Director*
- **St. James's Place Wealth Management Group**, *Divisional Director, Business Development & Advice*
- **Strategic Solutions Financial Services**, *Partner & Chartered Financial Planner*
- **Syndaxi Chartered Financial Planners**, *Managing Director*
- **Tavistock Investments Plc**, *Corporate Development Director*
- **The Premier Partnership Limited**, *Director*
- **Throgmorton Private Capital Ltd**, *Investment Consultant*
- **Timothy James and Partners Ltd**, *Director*
- **Timothy James and Partners Ltd**, *Finance Consultant*
- **Timothy James and Partners Ltd**, *Financial Adviser*
- **Titan Wealth Planning**, *Head of Proposition*
- **True Potential Wealth Management LLP**, *Financial Adviser*
- **True Potential Wealth Management LLP**, *Paraplanner*
- **True Potential Wealth Management LLP**, *Wealth Management Partner*
- **Union Bank of India**, *Non Executive Director*
- **WH Ireland**, *Wealth Planner*
- **Walden Capital**, *Director*
- **Walden Capital**, *Senior Paraplanner*
- **Walden Capital**, *Trainee Financial Adviser*

- **Which?**, *Policy Advisor*
- **Wise Investment**, *Head of Paraplanning*

FACILITATORS & SPEAKERS

- **Silverback Consultancy**, *Senior Business Development Manager*
- **TISA**, *Head of Retirement*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Platforum**, *Associate Research Director*
- **Platforum**, *Head of Platforum*
- **UK Community Foundations**, *CEO*